CALIFORNIA ENERGY COMMISSION
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October 31, 2003

TO: INTERESTED PARTIES

SUBJECT: REQUEST FOR PROPOSALS (RFQ) #400-03-401

Notice is Hereby Given That The Above RFQ Is Amended As Follows

Section I, Introduction, is amended as follows:
"Replace page 1 of 27 with the attached, page 1 of 27, dated October 31, 2003."

Section II, Administrative Information, is amended as follows:
"Replace page 10 of 27 with the attached, page 10 of 27, dated October 31, 2003."
"Replace page 11 of 27 with the attached, page 11 of 27, dated October 31, 2003."

Section III, SOQ Format and Required Documents, is amended as follows:
"Replace page 16 of 27 with the attached, page 16 of 27, dated October 31, 2003."

Section IV, Scope of Work, is amended as follows:
"Replace page 18 of 27 with the attached, page 18 of 27, dated October 31, 2003."
"Replace page 19 of 27 with the attached, page 19 of 27, dated October 31, 2003."
"Replace page 21 of 27 with the attached, page 21 of 27, dated October 31, 2003."

Section V, Hypothetical Questions, is amended as follows:
"Replace page 26 of 27 with the attached, page 26 of 27, dated October 31, 2003."

Section VI, Qualifications Evaluation, is amended as follows:
"Replace page 27 of 27 with the attached, page 27 of 27, dated October 31, 2003."

Exhibit A, Evaluation Criteria, is amended as follows:

"Replace page 2 of 6 with the attached, page 2 of 6, dated October 31, 2003."
"Replace page 3 of 6 with the attached, page 3 of 6, dated October 31, 2003."
"Replace page 4 of 6 with the attached, page 4 of 6, dated October 31, 2003."
"Replace page 5 of 6 with the attached, page 5 of 6, dated October 31, 2003."

Attached are the most significant questions and answers presented at the Bidder's Conference and received in writing, and a list of conference attendees. Please remember that all Disabled Veteran Business Enterprise Participation Goals or Good Faith Efforts must be met. In order to comply with the Disabled Veteran Good Faith Efforts compliance, the deadline to place an ad is **November 5, 2003.**

All further questions regarding this RFQ must be administrative only and directed to the Contract Officer. To ensure timely delivery, Statements of Qualifications must be **delivered no later than 5:00 PM, November 19, 2003, to the Energy Commission.**

Except as herein amended, all other terms and conditions shall remain the same.

Sincerely,

PEG A. PIGEON
Contract Officer

Attachments

REQUEST FOR QUALIFICATIONS

Section 1 - Introduction

Background Summary

For many years, the California Energy Commission has successfully implemented energy efficiency programs, providing engineering and architectural services to the following participants:

- Public or non-profit schools, colleges, and universities
- City or county governments
- Public or non-profit hospitals
- Special districts
- Public or non-profit care institutions, e.g., long term care institution, rehabilitation institution, institution for the provision of public health services, a residential child care facility
- Other eligible facilities

These programs have provided technical support and funding to retrofit heating, ventilating, air conditioning, lighting equipment, controls, and motors within existing buildings. The programs also provided new construction design support as well as services to help public agency personnel evaluate proposals from Energy Services Companies.

What is the Purpose of this RFQ?

This Request for Qualifications (RFQ) is to solicit and select, a single consulting Prime Contractor that will head a team of engineers and architects under Subcontracts, to assist and support the Energy Commission. The team must include architects and engineers with expertise in new construction and in modernizing, renovating and retrofitting existing buildings.

The Commission will accept bids from a Prime Contractor representing a team of companies. A single company, and not a group of representatives from different companies, must bid as the Prime Contractor. The Prime Contractor will be responsible for all contract administrative duties, and may also participate in technical work assigned. The team must include a minimum of three architectural and engineering companies. The intent is to have the ability to access either architectural or engineering services from at least three separate firms. Three independent engineering and/or architechtural firms, regardless of discipline, qualify as three subcontractor firms. The architects must have expertise in new public building contruction projects including schools, small and large institutional facilities, such as jails and city, county and state office and administrative buildings. The engineers must have experience in performing energy analysis, energy audits, feasibility studies of energy projects, and renewable energy generation projects. The three firms combined with the Prime Contractor must have the skills and experience discussed in the RFQ.

The Prime Contractor will provide administrative support by directing subcontractors in all contract provisions. The team will support new construction through the review of new facility designs and computer simulations, recommending cost-effective alternatives to increase energy efficiency, reduce energy cost, and/or use a renewable resource. The team will support modernization, deferred maintenance, and retrofit projects by conducting facility energy audits and preparing technical reports and performance specifications.

Immaterial Defect

The Commission may waive any immaterial defect or deviation contained in a Bidder's proposal. The Commission's waiver shall in no way modify the proposal or excuse the successful Bidder from full compliance.

What Information Is Required for Subcontractors?

The Bidder must identify subcontractor(s) in the SOQ. The Bidder must provide a summary of each subcontractor's qualifications, experience and duties that would be performed under the Scope of Work found in Section IV.

If new subcontractors are hired or added after the contract is signed, the Prime Contractor shall submit proposed subcontractor contracts to the Commission for review and approval. At the same time, the Prime Contractor shall provide the Commission with updated Disabled Veteran Owned Business Enterprise forms. The Prime Contractor is responsible for the quality of all subcontractor work, and the Commission will assign all work to the Prime Contractor.

On What Grounds Would My SOQ Be Rejected?

An SOQ shall be rejected if:

- It is received after the exact time and date set for receipt of SOQs.
- It is considered nonresponsive to the California Disabled Veteran Business Enterprise participation requirements.
- It is lacking a properly executed Certification Clause(s), Attachment 3.
- It contains false or intentionally misleading statements or references which do not support an attribute or condition contended by the Bidder.
- If the SOQ is intended to erroneously and fallaciously mislead the State in its evaluation of the SOQ and the attribute, condition, or capability is a requirement of this RFQ.
- There is a conflict of interest as contained in Public Contract Code Sections 10410, 10411, or any other conflict of interest law or eligibility conflict interest rules in this RFQ.
- It contains confidential information.

An SOQ may be rejected if:

- It is not prepared in the mandatory format described.
- It is unsigned
- It does not literally comply or contains caveats that conflict with the RFQ and the variation or deviation is not material, or it is otherwise nonresponsive.

Section II – Administrative Information

Are There Important Selection Process Steps?

Interviews

Interviews of the top three bidders will be conducted during the Evaluation Process for this RFQ. Bidders should anticipate travel to the Energy Commission Headquarters. Interview dates are tentatively set for December 9, 2003.

Notice of Selection

Subsequent to the SOQ evaluations, on December 16, 2003, after 12:00 noon, a "Notice of Selection" will be mailed to all bidders. It will also be posted in the Commission's Contracts Office and posted on the Commission's web site.

Negotiations

Pursuant to Title 20, CCR, Section 2565 and Public Contract Code (PCC) 6106, within 14 days after posting the Notice of Selection, the Commission will begin negotiations with the top three ranked Bidders for an acceptable fee (hourly rates). The top ranked Bidder will be required to submit a list of rates after written notification of selection. If negotiations with the top ranked Bidder fails, the Commission will enter into negotiations with the next highest Bidder, and so on. If negotiations with the top three ranked Bidders fail, negotiation will be entered into with the next three highest ranked Bidders, and so on.

How Do I Know If I've Been Awarded A Contract?

Notice of Award

On January 6, 2004, a "Notice of Award" will be mailed to the successful Bidder. It will also be posted in the Commission's Contracts Office and posted on the Commission's web site.

What Happens To My Documents?

On the submission date, all SOQs and related material submitted in response to this RFQ become the property of the State. After the Notice of Award is posted, all SOQs and related materials become public records. In addition, all evaluation and scoring sheets become public records after the Notice of Award is posted.

What Are The Contract Requirements?

Term of the Contract

The contract will be effective up to three years beginning from the commencement of the contract term.

RFQ in Final Contract

The content of this RFQ will be incorporated by reference into the final contract.

Contract Cancellation

The Commission reserves the right to terminate any contract awarded through this RFQ by providing a 30-day notice to the successful Bidder.

Contract Amendment

The contract executed as a result of this RFQ will be able to be awarded by mutual consent of the State and Prime Contractor. The contract may require amendment as a result of project review, changes and additions, changes in project scope, or availability of funding.

1. Describe any technical capabilities that would facilitate communicating with the Commission (e.g., internet capability and electronic reports).

Project Team Relevant Experience and Qualifications

1. Document the project team's qualifications as they apply to performing the tasks described in the Scope of Work. Describe the nature and scope of recently completed work, such as energy analysis, energy auditing, architectural and engineering design, project and construction management, building/system commissioning, renewable energy project feasibility studies, and project cost estimating.
2. Describe the project team's experience in with local government facilities, k-12 school/college facilities, state buildings, and other public facilities. Describe experience in reviewing new public facility designs, conducting facility energy audits, and reviewing and analyzing energy project proposals made by others.
3. Identify and list all Prime Contractor staff and subcontractors (all team members) who will be committed to the tasks and describe their roles.
4. Describe job classification, relevant experience, education, academic degrees and professional licenses of these technical staff team members.
5. Provide a current resume for all team members listed and identify the percentage of time each team member will be available throughout the contract.
6. Describe their familiarity with the administration, management, and technical expertise in performing pertinent tasks identified in the Scope of Work.

Customer References

Each Bidder shall complete a Customer Reference Form, Attachment 4. Three customer references are required for the Prime Contractor and three customer references are required for each subcontractor.

Examples of Prior Work

Each Bidder shall provide a minimum of one example of a work product for each of the following tasks (it is not necessary to provide seven copies of each work product, only one copy of each example is required):

? Task 1: Energy Efficiency Opportunities in Existing Buildings
? Task 2: Support for New Construction Projects
? Task 3: Evaluate Opportunities for Cogeneration, Distributive Generation, Renewable Energy Systems, and Thermal Energy Storage,
? Task 4: Evaluate Energy Efficiency Opportunities in Water and Wastewater Treatment Facilities,
? Task 5: Engineering Support
? Task 6: Energy Efficiency Marketing.

If more than one company will be providing technical support in a task area, each firm shall submit one example product for the task. Companies should provide work examples that demonstrate experience in public sector projects related to potential work assignments described in this RFQ.

Section IV. - Scope of Work

About This Section

In this section, the Commission describes the tasks the Prime Contractor (referred to as "Contractor" in the Scope of Work) will be asked to perform under the direction of the Commission Contract Manager. This section also describes the work assignment process, deliverables, and due dates.

Primary Tasks

The seven major categories of work are divided into seven tasks:

Tasks	Description of Task
1	Evaluate Energy Efficiency Opportunities in Existing Buildings
2	Support for New Construction Projects
3	Evaluate Opportunities for Cogeneration, Distributive Generation, Renewable Energy Systems, and Thermal Energy Storage
4	Evaluate Energy Efficiency Opportunities in Water and Wastewater Treatment Facilities
5	Engineering Support
6	Program and Energy Efficiency Marketing
7	Administrative Support Services to Contract. (Contractor Only.)

Contractor may be asked to perform the following tasks as directed by the Contract Manager.

Task 1 – Evaluate Energy Efficiency Opportunities in Existing Buildings

Contractor will conduct facility energy audits and prepare technical reports identifying energy efficiency opportunities in public buildings or facilities as assigned. Depending on the nature of the project, the Contract Manager may require a California registered professional engineer must be on site and sign off on the validity of the report recommendations. The energy audits may be comprehensive or technology specific at the direction of the Contract Manager. A comprehensive study includes a detailed analysis of all energy efficiency opportunities within the facility. A study may also be authorized for a single purpose project, focusing on a particular technology (e.g. lighting only). For comprehensive energy audits, the Commission may ask that the energy audit analysis and technical report be prepared according to the Commission's Feasibility Study Guidelines. (P400-00-002)

Section IV - Scope of Work

Typical project areas to be considered in an energy audit include, but are not limited to the following:

? Lighting
  - Incandescent, fluorescent, HID lighting conversions, and LED exit signs
  - Traffic and Street lights
  - Occupancy sensors (ultrasonic or passive infrared)

? Heating, Ventilating and Air Conditioning (HVAC)
  - Upgrade natural gas fired boilers
  - Efficient cooling towers
  - Primary/secondary pumping
  - Heat recovery
  - Evaporative cooling
  - Variable speed, two speed and high efficiency motors
  - Packaged air conditioner or chiller replacement.

? Controls
  - Energy management systems, including demand control
  - Modifications of existing controls and system operations
  - Dual duct conversions
  - Outside air economizer operations and modifications

Contractor will assist public agencies in the contract process, including preparing performance specifications. Upon completion of the energy audit and technical reports, the Contractor may be directed to develop performance specifications and provide other services as needed to assist a public agency in the construction of projects recommended in the audit. The Contract Manager will determine whether this work shall be included in the work authorization.

Task 2 –Support for New Construction Projects

Contractor will conduct reviews of new public facility designs, including developing and/or evaluating building computer simulations, and recommending cost effective design alternatives to increase building energy efficiency. Assist public agencies to exceed Title 24 Building Energy Standards. New Construction assistance goal is to provide support to exceed Title 24 Standards for energy savings by at least 10%.

The Contractor will be directed by the Contract Manager to advise the public agency and /or the agency's architect and mechanical engineers on energy efficient design alternatives including developing life-cycle cost comparisons of alternatives. This may include but is not limited to:

? Review and make recommendations on lighting systems, daylighting opportunities or design layouts.
? Review and make recommendations on building orientation, envelope features including energy optimized insulation and fenestration.
? Review and make recommendations on HVAC systems and energy management controls including identification of load shifting opportunities.
? Develop baseline and proposed building simulation models.
? Estimate incremental cost for alternatives and developing cost benefit analysis.

assist local agencies to procure services from Energy Service Company's or to provide an independent third-party review of an existing Energy Service Company proposal.

- Commissioning: Recommend building and/or equipment Commissioning procedures and assist in oversight inspection and Commissioning of installed energy efficiency or energy related projects. Commissioning services could include:
  - Help in developing a Commissioning plan for a specific building; or
  - Reviewing and commenting on the adequacy of the commissioning protocols proposed by a design team for an entire building or energy system.

- Monitoring and Verification: Perform independent monitoring and verification of energy project installations to compare "actual" energy savings with those identified in the energy study or report. The Contractor may be asked to provide project troubleshooting using the Commission's or its own monitoring and verification tools.

- Utility Rate Analysis: Review current utility rates and determine whether the public agency could benefit by changing rates based on the recommended projects. The Contractor may also be assigned to review the current rates and evaluate the impacts of pending California Public Utility Commission (CPUC) rulemaking, especially for power generation projects (e.g. cogeneration, landfill gas). Also the Contractor may be assigned to evaluate the impact of current/ planned Demand Side Management, Demand Responsive, distributed generation incentives and their impact on project feasibility.

Task 6 – Program and Energy Efficiency Marketing

Contractor will provide program and energy efficiency marketing assistance. Contractor will assist in the development of marketing materials that may include case studies, energy efficiency program brochures and applications.

Task 7 – Administrative Support Services to Contract. (Contractor only.)

The Contractor will perform the following as required for the work performed by subcontractors during the contract period:

? At the direction of the Contract Manager, issue Commission prepared work authorizations which define the scope of work, the schedule of deliverables and the project budget for work to be done by subcontractors;
? Prepare and issue contract agreements with subcontractors that convey all provisions contained in the contract between the Commission and the Contractor for the review and approval of the Contract Manager;
? When directed by the Contract Manager, hire vendors or additional subcontractors to obtain needed products and services;
? When new subcontractors are hired or added, the Contractor shall submit proposed subcontractor contracts to the Commission for review and approval. At the same time, the Contractor shall provide the Commission with updated Disabled Veteran Owned Business Enterprise (DVBE) forms. The Contractor is responsible for the quality of all subcontractor work and the Commission will assign all work to the Contractor.

Q 3-2. What energy efficiency measures will you recommend for this facility and why? List all assumptions and show calculations.

Q 3-3. Using the above data only (without making any assumption), calculate the gallons of water you can save per year for this facility by suggesting an energy efficiency measure. Identify the measure and show your calculations.

Q 3-4. What operational and maintenance changes would you recommend for the facility and why?

Question #4:

A hospital has a day time peak demand of 3,000 kW. At night the demand drops to 2,000 kW. Most of the motors run at reduced load during the night. The hospital plans to install a 1,500 kW co-generation plant. This plant will run in parallel to the utility. This plant will run 24 hours a day at full load. The plant will supply approximately 1,500 kW of power to the hospital. The rest of the power will be supplied by the utility. Before the installation of the co-generation plant, the hospital's power factor is between 0.75 and 0.85.

Q 4-1. What are the power quality related issues resulting from the operation of the co-generation plant? How will you solve them?

Q 4-2. What operating power factor would you recommend for the co-generation plant? What parameters would you recommend to check before making any adjustment to the co-generation power factor?

Q 4-3. List all the benefits and costs you would consider in evaluating the feasibility of a co-generation plant in a hospital. Provide an itemized list of the co-generation project expenses. Discuss the reality checks to be used to ensure that the cost estimates are accurate.

Q 4-4. After the construction of the co-generation plant is completed, what are your recommendations to ensure that the savings from the co-generation plant are sustainable and reliable?

Question #5:

A 980 square feet portable classroom located in Fresno has a 2.0 ton electric heat pump. The classroom has 25 students and a teacher. The heat pump keeps the classroom cool all the time. When all the students are present in the class, the compressor is on for 70 percent of the time during the summer peak periods.

Q 5-1. Based on the information provided, what is the problem with this classroom? How will you resolve it?

Q 5-2. Provide a list of recommendations to ensure that the problem is solved permanently.

Q 5-3. What steps would you take to mitigate lighting and HVAC equipment noise in portable classrooms?

Section VI. - Qualifications Evaluation

What Are The Evaluation Stages?

To analyze all SOQs, the Commission will organize a committee whose members have expertise in evaluation of consulting services. The Committee will analyze the SOQs in three stages.

Stage One: Fulfillment of RFQ Mandatory Format

The Contracts Office will first identify those Bidders whose SOQs adhere to the mandatory format outlined in Section III.; Bidders who do not follow the mandatory format may be eliminated from the competition.

Stage Two: Evaluation of Qualifications

The Evaluation Committee will then review and score all remaining SOQs based on the Evaluation Criteria in Exhibit A. The preliminary final score for each SOQ reflects the average of the combined scores of all evaluation committee members. After the review, the Evaluation Committee will identify the top three Bidders and shall schedule interviews.

Stage Three: Interviews

The Evaluation Committee may use patterned questions to conduct Bidder interviews. The Evaluation Committee may provide the top three Bidders with a copy to the questions to be addressed and a format for the structured interviews. Bidder responses to the questions will be scored based on the criteria in Exhibit A. Upon completion of the interviews, the Evaluation Committee may make adjustment to the scores and re-rank the top competitors.

The Evaluation committee may reject all Bidders and SOQs if none are considered in the best interest of the Commission.

Exhibit A – Evaluation Criteria

How Will the SOQs Be Ranked?

After each SOQ is scored, it will be placed on a list, in rank order, with the highest scoring SOQ placed first and the remainder in descending order based on score.

What Are The Negotiation Rules?

The Commission will initiate cost negotiations with the first ranked Bidder(s) as determined above. If negotiations fail with a Bidder and the Commission needs to initiate negotiations with a subsequent Bidder, the following rules will be applied to select the subsequent Bidder(s):

The Bidder's name that failed in negotiations will be taken off the respective ranking list.

The Commission will then initiate negotiations with the next highest Bidder.

Evaluation of Written Proposal – Criteria

1. Approach to Tasks in Scope of Work *(Maximum points 210)*			
(a). *General Approach*	**Weight**	**Max. Points**	**Point Total**
1. Response to Scope of Work: ✓ Completeness and thoroughness of the Work Plan (addresses all of the tasks defined). ✓ Demonstrated understanding of Scope of Work tasks. ✓ Clarity, succinctness and organization of SOQ.	**2**	**10**	**20**
2. Demonstrated experience with similar tasks. Use of appropriate classification of staff for Scope of Work tasks.	**2**	**10**	**20**
Innovative approaches to work tasks	**2**	**10**	**20**
(b). Task 1 – *Evaluate Energy Efficiency Opportunities in Existing Buildings*	**Weight**	**Max. Points**	**Point Total**
Relevance and quality of examples demonstrating knowledge and understanding of: ✓ Cost-effective energy efficient technologies ✓ Codes and regulations for retrofits ✓ Experience in preparing performance specifications for energy efficiency projects ✓ Experience in preparing high quality, technically sound and well documented technical reports. ✓ Funding and regulatory review process for school and other public facilities ✓ Implementation experience on recommended projects	**4**	**10**	**40**
(c). Task 2 – *Provide support for New Construction projects*	**Weight**	**Max. Points**	**Point Total**
1. Relevance and quality of examples demonstrating knowledge and understanding of:	**4**	**10**	**40**

Exhibit A – Evaluation Criteria

✓ New construction design review ✓ Building simulation models ✓ Cost estimating ✓ Sustainable building design concepts ✓ Economic analysis of energy efficiency measures ✓ Codes and regulations ✓ Performance specifications ✓ Knowledge of technically and economically feasible energy projects ✓ High performance school design strategies efficiency			
(d). Task 3. – *Evaluate Opportunities for Cogeneration, Distributive Generation, Renewable Energy Systems, and Thermal Energy Storage*	**Weight**	**Max. Points**	**Point Total**
Relevance and quality of examples demonstrating knowledge and understanding of: ✓ Cogeneration ✓ Distributive Generation ✓ Renewable Energy Systems ✓ Thermal Energy Storage ✓ Project feasibility and cost ✓ Regulation Issues ✓ Project experience beyond feasibility study	**2**	**10**	**20**
(e). Task 4. – *Evaluate Energy Efficiency Opportunities in Water and Wastewater Treatment Facilities*	**Weight**	**Max. Points**	**Point Total**
Relevance and quality of examples demonstrating: ✓ Evaluation of energy efficiency opportunities in water and wastewater treatment facilities. ✓ Electrical load management systems and strategies ✓ Motor and pump analysis, including variable speed drives ✓ Fuel cell analysis ✓ Actual project experience beyond feasibility study ✓ Process improvement	**2**	**10**	**20**
(f). Task 5. – *Provide Engineering Support*	**Weight**	**Max. Points**	**Point Total**
Relevance and quality of examples demonstrating: ✓ Experience in providing independent and critical review of investment grade audits and studies ✓ Experience in independently reviewing third party-prepared commissioning plans, test results and reports ✓ Experience in providing critical reviews of the energy elements in a performance contract ✓ Experience in evaluating project life cycle costs ✓ Experience in reviewing and conducting measurement and verification plans ✓ Knowledge of utility incentive programs ✓ Experience providing utility rate analysis ✓ Knowledge of the building and equipment commissioning process	**3**	**10**	**30**

Exhibit A – Evaluation Criteria

(g). Task 6. – *Program and Energy Efficiency Marketing*	**Weight**	**Max. Points**	**Point Total**
Relevance and quality of examples demonstrating: ✓ Marketing materials such as brochures and applications ✓ Energy efficiency case studies that showcase successful program projects.	**1**	**10**	**10**
PRIME CONTRACTOR'S QUALIFICATIONS *(Maximum points 30)*	**Weight**	**Max. Points**	**Point Total**
a) Ability to provide: ✓ Effective contract management ✓ Appropriate contract management team ✓ Timely and expeditious approval of work authorizations and other contract services ✓ Subcontractors with prompt payment ✓ Cost effectiveness and efficient contract management and administration methods. ✓ Analytical Tools ✓ Experience and technical knowledge to oversee subcontractor work	**3**	**10**	**30**
PROJECT TEAM RELEVANT EXPERIENCE AND QUALIFICATIONS *(Maximum points 30)*	**Weight**	**Max. Points**	**Point Total**
a) Ability to provide quality services for all task areas using multiple subcontractors b) The experience and qualifications of the Bidder's project manager.	**1**	**10**	**10**
c) The experience and qualifications of the team members working in their technical area(s). ✓ Qualifications of assigned personnel ✓ Experience of assigned personnel ✓ Availability of assigned personnel ✓ Education of assigned personnel ✓ Demonstrated accomplishments of assigned personnel on Scope of Work task areas	**2**	**10**	**20**
REFERENCES *(maximum points 40)*	**Weight**	**Max. Points**	**Point Total**
✓ Relevance of references to this RFQ and the Scope of Work tasks ✓ Validation of experience and performance as reflected in client reference questions	**3**	**10**	**30**
5. EXAMPLES OF PRIOR WORK *(maximum points 40)*	**Weight**	**Max. Points**	**Point Total**
✓ Depth, quality, and relevance of work examples	**4**	**10**	**40**

Exhibit A – Evaluation Criteria

6. RESPONSE TO QUESTIONS IN HYPOTHETICAL ILLUSTRATIONS *(maximum points 80)*	**Weight**	**Max. Points**	**Point Total**
✓ Accuracy of response to each question ✓ Clarity and succinctness of response ✓ Demonstrated knowledge of the issues ✓ Breadth and depth of response	**8**	**10**	**80**
Evaluation of Written Proposal *(Maximum Points)*			**430**
Evaluators Subtotal			
Evaluation of Oral Interview *(Maximum Points)* *(Interview evaluation for three top ranked Bidders only)*			**70**
OVERALL TOTAL SCORE			**500**

RFQ # 400-03-401

Questions and Answers from the October 21, 2003, Pre-bid Conference

BUDGET ISSUES

1. Regarding the Reimbursable Funds ($156,000) listed in the budget on page 2 of 27, is it possible to increase this amount if a lot of participants are interested in cost sharing?

The maximum funding available for this RFQ is $2,240,000. This amount cannot be exceeded. If the amount from a particular funding source is less than those estimated in Section I (page 2 of 27), the amount contributed from the other funding sources could be increased. However, the total for all funding sources cannot exceed $2,240,000.

CONFLICT OF INTEREST CONCERNS

1. Is the sub or the prime excluded from doing the follow-up or prior work connected to a project?

Once a Commission-funded energy audit is completed, it is the decision of the public agency as to whether a Commission contractor would be eligible for subsequent work related to the recommendations in the energy audit. However, the Commission has strived to provide independent, credible and objective project analysis on all technical assistance work. We do not want to see contractors using this contract in a manner that would jeopardize our ability to provide independent analysis or would result in actual or perceived conflicts of interests.

Obvious examples of conflict of interest include bidding on work for which your firm was involved in the bid document preparation, or reviewing an energy audit that was completed by your firm but independent of our program. Since there are many more examples, it is the prime or subcontractor's responsibility to notify the Commission contract manager if there are or could be potential conflicts of interests on any work assignments. The Commission contract manager will evaluate each situation on a case-by-case basis.

NOTE: "Clarification from Commission's Legal Office: A prime or sub who has worked on a project, is not allowed to bid on or be awarded follow on work as a result of the original project. This is a legal requirement and is not based on the decision of the public agency."

2. Are other subs on the same team, who did not work on a project, excluded from doing the follow-up or prior work connected to that project?

No. See previous response.

3. Can you explain little bit more about the Engineering Services referred in your task list?

Task 5 describes various engineering support services that may be needed during our contract term. These are types of services that have been requested by public agencies in the past. Some, such as monitoring and verification, may be needed after projects

have been installed. While others, such as utility rate analysis or commissioning, may occur in conjunction with Task 1 or 2. However, the extent that these services will be used in our contract is unknown.

For a discussion of implementation assistance associated with Tasks 1 and 4, please refer to the response to question 3 in the Scope of Work section.

CURRENT TECHNICAL ASSISTANCE CONTRACT QUESTIONS

1. Can we look at the projects done in past? Locations in the state?
Please see Attachment A for a five-year project listing for the Bright Schools, Energy Partnership and Water Programs.

2. Can you discuss the performance of the last contract for the activities covered by this RFQ?

a) How much work, in dollars, was completed per task area, per year?
Please see Attachment B.

b) How much work per task area is envisioned for this contract?
It is unknown at this time.

c) What lessons were learned from the last go around?
The current contract is still on-going and will not be completed until December 2004. Therefore, this information is not available.

d) Are there evaluations available of the program and/or the contractors?
No. See previous response.

3. **May we obtain a list, including contact information, of the prime contractors and sub-contractors successfully providing services under the existing contracts?**
Please see Attachment C.

CUSTOMER REFERENCES

1. Please clarify: Page 16 asks for three customer references. Attachment 4 requests a minimum of four.
Attachment 4, should state three (3) customer references. This will be corrected in the Addendum.

DVBE ISSUES

1. How can I get a list of sub-contractors and DVBE firms?
You may contact the Commission's DVBE advocate, Sandra Barnett, at 916 654 5186 or sbarnett@energy.state.ca.us for information. Additionally, information is available through the DGS website at www.dgs.ca.gov.

DEFINITIONS

1. What do you mean by Local Governments?
City or county governments

ENERGY COMMISSION PROGRAMS

1. Who is eligible to participate in the Energy Commission Programs?
The following institutions are eligible to participate in the Energy Commission technical assistance programs (Bright Schools and Energy Partnership Programs):

- Schools (public or *non-profit*)
- Hospitals (public or *non-profit*)
- Cities
- Counties
- Special districts
- Public care institutions (public or *non-profit*)

2. Will the projects from State facilities be included under this Program?
The only state facilities currently eligible for our program are public education institutions (e.g., University of California campuses, California State Universities and community colleges), state hospitals and state-owned public care facilities.

3. What State facilities are currently included in Energy Commission Programs?
See the answer for question 2.

4. What are the chances of including other State Facilities in the Program? Will it change the funding mix?
Currently, there is a legislative proposal to include all state facilities in the program. If approved, the earliest effective date will be January 2005. However, the legislative proposal is in a very early stage and it is unknown whether the proposal will occur or be approved. The RFQ funding mix will remain unchanged even if state facilities are added later.

5. Do you require the participants to have match share?
The Commission currently pays 100%; up to a maximum of $20,000 for K12 participants in the Bright School Program and up to a maximum of $10,000 for the other eligible participants in the Energy Partnership Program (see response to Question 1 under Energy Commission programs). When the technical assistance cost exceed the above specified maximums, the participant needs to pay for the remaining assistance cost.

For new construction technical assistance, PG&E and SCE have historically shared some of the analysis cost with the Energy Commission for engineering or architecture firms that are also on their consultant list.

This is the current program structure. We reserve the right to make program changes at any time. Future program changes will not impact the work specified in this RFQ.

6. Is the limit for the technical assistance amount going to change?
See response to the previous question.

INTERVIEWS

1. **Please clarify: Page 11 indicates that interviews are tentatively set for December 9. Who will be interviewed? All teams, or just the three best teams? Page 27 seems to indicate that it will just be the top three, but Page 11 makes it sound like all bidders.**
   Only the top three bidders will be interviewed.

MARKETING ENERGY COMMISSION PROGRAMS:

1. **What is the recruiting process for sites? Will the CEC do that, or will we do that as part of Task 6?**
   The Energy Commission will recruit program participants through various forms of marketing such as, workshops, conferences, direct mailings, and association memberships. The Energy Commission does not want the contractor or its subcontractors to "self promote" and use this contract to recruit customers and market its services. Contractors may be responsible for developing marketing materials as described in Task 6.

PAYMENT STRUCTURE

1. **RFQ does not contain a discussion of payment provisions that would be applied to the successful bidder, but notes that rates will be negotiated with the highest ranking bidder. I have several questions regarding payment structure.**

   a) **Will the payment structure allow the prime contractor to mark-up subcontractor costs to recover fee (profit) and general and administrative costs (for example by applying a fixed percentage mark-up on subcontractor costs) , or will the structure only allow direct time and materials costs?**
   The prime contractor will not be allowed to mark-up subcontractor costs. All time associated with managing subcontractors will be paid based on direct time and materials costs up to maximum amount established through the cost negotiation process. Unless otherwise directed by the Commission contract manager, the time spent by the prime contractor in reviewing and managing subcontractor will be minimal.

   b) **Will there be a separate task within the contract for prime contractor project management or will the costs associated with project management be separately budgeted as part of each work assignment?**
   There will be a separate work authorization with the Prime Contractor that will allow project management and administrative tasks to be billed separate from each project work assignment.

PRE-BID CONFERENCE ATTENDEES

1. **Would you make a list of Pre-Bid Conference attendees and those submitting Questions available?**
   The list is attached to this document. You may also obtain a copy from the Commission's website at www.energy.ca.gov/contracts.

PRIME CONTRACTOR ISSUES

1. Do you require the prime to have all the skills?
No, the prime contractor does not need to have all the skill sets we are requiring in the RFQ. However, the prime contractor must have a basic understanding of the subcontractor's technical work assignments and a good grasp of the quality standards required by the Commission. The prime contractor will be responsible for doing a cursory review of subcontractor work to ensure that it meets minimum Commission quality standards. However, the prime contractor is not expected to thoroughly check the technical analysis or to be an expert in all technical assignments.

2. Do you require the prime to be an Architect, Mechanical or Electrical Engineer?
Yes

3. Who will evaluate the work done by the prime contractor?
The Commission's technical staff will review and evaluate the work preformed by the prime contractor.

4. Who will have authorization to assign work to team members? The RFQ states that "the Commission will assign all work to the prime contractor", but also describes criteria for assigning work to particular team members.
The Commission contract manager will work cooperatively with the prime contractor. If the Commission has a strong preference for using one subcontractor, we will still work with both the subcontractor and the prime contractor in drafting the work authorization. All work authorizations are approved and signed by the prime contractor and the Commission's contract manager.

5. When you award the work how do I know what to do?
For each work assignment, a work authorization will be written by the Commission contract manager. This work authorization is prepared in consultation with the subcontractor and prime contractor.

6. What is the policy regarding substitution of key staff members (e.g. registered engineers) in the case of any personnel changes over the next three years (e.g. work with those originally on proposal, new employees and/or new firms added to team, or other), and how has this played out in practice?
Any new prime or subcontractor employees that are added after the contract is executed must be approved by the Commission's contract manager prior to working on this contract. Resumes of new employees must be submitted to the Commission's Contract manager for review and approval.
Regarding the adding of a new sucontracting firm, please see anwser to question 10 under "Team Structure".

SCOPE OF WORK

1. What size of co-generation plant you are you looking for?

The contractor will typically evaluate small size co-generation plant that displace the facility's own energy use. Generally, the capacity is less than one megawattt, but for a large hospital or detention facility it can be as high as three megawatts.

2. **Will Prime Contractor and Team generally be working with other new facility design teams from the onset of a project, or is this intended for review of projects that are already underway (especially under Task 2--Support for New Construction Projects, and Task 5-Engineering Support)? Our concern is that bringing in our Contractor team on an ongoing project could create an awkward team dynamic, if not implemented carefully.**
   We realize the need for us to be involved in the early phases of a new contruction project and we screen the applicants to determine where they are in the process and their willingness to consider changes. We prefer to involve our contractor in the early design stage. In the past, our contractor was involved during the schematic design phase, construction drawing phase and even in some cases, after the completion of construction drawings. Also, our contractor work with the design team in developing simulation models.

3. **In Task 1 work scope there is the statement "*provide other services as needed to assist a public agency in the construction of projects recommended in the audit".* In Task 4, there is the statement *"the Contractor may be directed to assist the customer in implementing energy projects by providing services to support the bid process*".**

   a. **What types of tasks, such as design services or construction management are envisioned?**
      Any engineering design, construction management or other project implementation tasks are not paid for through this contract. These services are paid by the customer as part of the project installation. However, implementation services that could be requested by the Commission's contract manager include preparing performance specifications for recommended equipment and bid documents, reviewing bids, evaluating contractors, reviewing/preparing commissioning specifications, and/or evaluating project change orders. If these services are needed, they will be identified in the work authorization.

   b) **These types of services are not mentioned for Tasks 2 and 3, is it correct that these additional services would not be required for new construction or cogeneration?**
      These services may be required for Tasks 2, 3 and 4. It is not possible to forecast the need for all the services for all the projects. If needed, the Commission Contract Manager will request the consultant to perform such services as indicated in the work authorization.

4. **In the water/wastewater task, there is no discussion of process related measures, are they not covered in this scope?**
   Some of the tasks in the water/wastewater such as variable frequency drives, motors, lighting, controls and pumps are similar to the buildings. The process related measures are specific to a process, technology and plant. Process improvement measures are diverse and would only be included in the work authorization if they reduce facility energy use or cost.

5. **Page 18 identifies seven tasks. Without some certainty or idea of actual budget for each task, knowing how to allocate DBVE resources to meet set aside requirement is problematic. Can you give us a rough split on how much budget will be allocated to each task?**

   It is not possible to predict how much money will be spent on various tasks. Historically, most of our work authorizations involved analyzing energy efficiency improvements in existing facilities (Task 1). This included analyzing lighting, heating, ventilating and air conditioning systems, motors and variable frequency drives. A DBVE firm that can perform some of these tasks can fulfill the DBVE requirement.

SELECTION COMMITTEE

1. **What is the composition of the RFQ review committee? How many people are on it? What are their positions and experience?**
   The Selection Committee is composed of five technical staff from the Energy Commission.

SMALL BUSINES PREFERENCE

1. **Is there any preference for the small businesses?**
   No

STATEMENT OF QUALIFICATIONS - FORMAT

1. **Do you have any limit on the number of pages for the proposals?**
   No

TEAM STRUCTURE

1. **Can a firm be a subcontractor on multiple teams? Can a firm be a subcontractor on one team and a prime contractor on another team?**
   The Commission will allow subcontractors to be on more than one prime contractor team. However, a firm identified as a prime contractor on one team cannot be a subcontractor on any other team. A prime contractor may only submit for one team.

2. **How can we structure a team that can cover projects all over California?**
   This is up to the firm bidding as the Prime Contractor. Past strategies have included: 1) subcontractors located in various parts of California or 2) larger firms having satellite offices.

3. **Is there any geographical preference for the consultants?**
   No, work could be anywhere in California. Therefore, there is no geographical preference regarding the location of the team's offices. However, to make travel most cost effective, having teams members located in both Northern and Southern California may be advantageous.

4. **Do you have any preference for the skill level of the prime? And Do you have any preference for the skill level of the sub-contractor?**
Yes, the RFQ seeks architects and engineers that are energy efficiency project specialists. We are looking for firms specializing in energy efficiency project analysis for both new construction projects and retrofit conditions. We want the prime and subcontractors to have some overlapping capabilities so if we ever have a conflict with one firm, the skill sets/abilities are still available through another firm on the team.

5. **Do you have any preference for one person capable of doing all the tasks verses number of people doing the same task?**
We want a team structure where we have access to multiple firms. See also response to the previous question.

6. **Is the evaluation criteria based on number of people?**
No

7. **Under "What is the Purpose of this RFQ?" on page 1 of 27 - the second paragraph states "The team must include a minimum of three architectural and engineering companies". Is this in fact correct or a typo? It would seem to get three architectural and three engineering firms would be shopping for competitors. Can a team of one architect and one engineer bid this RFQ?**
The team must be a Prime Contractor with a minimum three subcontractors. Three independent engineering and/or architectural firms, regardless of discipline, qualify as three subcontractor firms. However, these three firms combined with the Prime Contractor must have the skills and experience discussed in the RFQ.

8. **Does a team need to have three firms with licensed architects?**
No. Actually, there is no requirement to have a licensed architect. However, the RFQ seeks architects that are experienced with energy efficiency projects as described in the work tasks. In the past, architects in our program have specialized in energy efficiency project analysis associated with new construction.

9. **Can a prime contractor require that subcontractors agree not to participate on another team in order to be included on their team?**
The Energy Commission has no such requirement. Also, see response to Question 1 under Team Structure.

10. **Can a subcontractor be added to a team after the contract is awarded, if they are not able to join the team during the selection process?**
With compelling justification**,** subcontractors can be added to a team after the contract is awarded only if directed by the Commission's Contract Manager.

TERMS AND CONDITIONS

1. **Some, but not all, of the terms and conditions included in the RFQ include a conflict of interest clause regarding bidding activities. We understand that the specific terms and conditions associated with the funding source will apply to the applicable task order. However, it is not clear if these specific terms and conditions apply in general to the entire contract and would cover all subcontractors regardless if they are involved in a specific task order.**

Since the subcontractors could be involved in work funded by any funding source, the conflict of interest clauses for all funding source must cover all subcontractors.

2. It appears that the three sets of Standard Conditions (5A, 5B, 5C) vary according to the work being performed. For example, 5B carries several clauses dealing with the protection of Intellectual Property (ours, and what is created during the Program) and the Refund of Royalties clause (DEAR 952.227-9), while 5A and 5C do not. I think 5C carries specific Contractor insurance level requirements whereas the other may not.

a) What if there is a conflict between the contracts, which one takes precedence?
Each work authorization (WA) will specify the one funding source that will be used along with the appropriate set of terms and conditions for that funding source. There will only be one funding source for each work authorization. Therefore, there will be no conflict.

b) What is the Bidder's opportunity to take exception(s) or add proposed language with the proposal? Specific concerns are adding "Waiver of Consequential Damages" and "Limitation of Total Liability" clauses; we are exposed to uncapped risk in the current versions.
The Energy Commission will not entertain any changes to the Terms and Conditions stated in Attachment 5A, 5B, and 5C. The terms are mandated by each funding source, and we do not have the ability to change them.

ORGANIZATION	TYPE OF ASSISTANCE	APPLICATION DATE	COUNTY
City of Anderson	TA	1/1/1998	Shasta
City Of Arcata	TA	1/7/2003	Humboldt
City of El Cajon	TA	1/1/1999	San Diego
City of Escondido	TA	8/1/1999	San Diego
City of Fountain Valley	TA	1/1/1999	Orange
City of Manteca	TA	10/14/1998	San Joaquin
City of Modesto	TA	12/1/1999	Stanislaus
City of National City	TA	4/8/2000	San Diego
City of Pasadena	TA	11/1/1998	Los Angeles
City of Sacramento	TA	11/1/1998	Sacramento
City of Sacramento	New Construction Review	9/6/2003	Sacramento
City of Susanville	TA	6/16/1999	Lassen
City of Tulare	Review Energy Audit	8/9/1999	Tulare
City of Redding	TA	8/1/1998	Shasta
County of Kern	TA	11/1/1998	Kern
County of Lassen	TA	7/1/1999	Lassen
County of Lassen Fair Grounds	TA	7/1/1999	Lassen
County of Ventura	New Construction Review	11/1/1999	Ventura
County of Fresno	New Construction Review	6/20/2002	Fresno
County of San Bernardino	New Construction Review	11/15/2001	San Bernardino
County of Santa Barbara	Design Assistance	11/8/2000	Santa Barbara
County Of El Dorado	TA	1/1/1997	El Dorado
City of Burlingame	Energy Audit	12/1/2001	San Mateo
City of Oakland	Electric Service Provider	1/1/2000	Alameda
City of Santa Rosa	Water/Waste Water Audit	1/31/2002	Sonoma
City of Stockton	TA	10/16/2001	San Joaquin
Mills Peninsula Health SVS	TA	7/23/2001	San Mateo
Community Hospital Of Long Beach	TA	5/1/2001	Los Angeles
Claremont University	TA	3/1/2003	San Bernardino
Mid Peninsula Health Open Space Dist	TA	10/1/2001	Santa Clara
Mendocino Coast Park Dist	New Construction Review	5/1/2002	Mendocino
City of West Covina	TA	3/1/2000	Los Angeles
City Of Ione	TA	5/24/2002	Amador
City Of Sierra Madre	TA	6/1/2001	Los Angeles
City Of Indio	TA	6/1/2001	Riverside
City of Ojai	TA	6/1/2000	Ventura
Fairfield Suisun Sewer District	Water/Waste Water Audit	10/29/2001	Solano
City of Kensington	TA	2/21/2002	Alameda
Washington Hospital	Co-Generation Analysis	8/13/2001	Contra Costa
Bear Valley Community Services Dst	Water/Waste Water Audit	10/1/2001	Kern
Stallion Springs Community SV Dist	Water/Waste Water Audit	10/1/2001	Kern
Contra Costa County Regional Medical Center	Co-Generation Analysis	7/1/2002	Contra Costa

TA= Technical Assistance/ Energy Audit.

Attachment A
Five Year Listing of Projects

ORGANIZATION	COUNTY	TYPE OF ASSISTANCE	DATE
City of Kensington	Alameda	Energy Audit	2002
City of Oakland	Alameda	Electric Service Provider	2000
Eden Area Regional Occupation Pgrm	Alameda	Energy Audit	1999
Fremont USD	Alameda	Energy Audit	2003
Oakland USD	Alameda	New Construction	2001
City Of Ione	Amador	Energy Audit	2002
Manzanita Elementary	Butte	Energy Audit	2002
Oroville City Elem SD	Butte	Energy Audit	2001
Contra Costa County Regional Medical Center	Contra Costa	Co-Generation Analysis	2002
Washington Hospital	Contra Costa	Co-Generation Analysis	2001
County Of El Dorado	El Dorado	Energy Audit	1997
County of Fresno	Fresno	New Construction Review	2002
Fowler USD	Fresno	Energy Audit	2001
Kings Canyon Joint Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
Selma Unified	Fresno	Energy Audit	2002
City Of Arcata	Humboldt	Energy Audit	2003
Northern Humboldt Union High	Humboldt	Energy Audit	2002
Brawley Union HSD	Imperial	Energy Audit	2001
Calexico Unified	Imperial	Energy Audit	2001
Calexico Unified	Imperial	Energy Audit	2001
Bear Valley Community Services Dst	Kern	Water/Waste Water Audit	2001
County of Kern	Kern	Energy Audit	1998
Stallion Springs Community SV Dist	Kern	Water/Waste Water Audit	2001
Hanford USD	Kings	Energy Audit	2002
Big Valley Jt.USD	Lassen	Energy Audit	2001
City of Susanville	Lassen	Energy Audit	1999
County of Lassen	Lassen	Energy Audit	1999
County of Lassen Fair Grounds	Lassen	Energy Audit	1999
Johnstonville ESD (1)	Lassen	Energy Audit	1998
Lassen Union HSD	Lassen	Energy Audit	2002
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001

Attachment A
Five Year Listing of Projects

ORGANIZATION	COUNTY	TYPE OF ASSISTANCE	DATE
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Antelope Valley Union High	Los Angeles	Energy Audit	2001
Burbank USD	Los Angeles	Energy Audit	2001
Chaminade College Preparatory (2)	Los Angeles	Energy Audit	1999
City of Pasadena	Los Angeles	Energy Audit	1998
City Of Sierra Madre	Los Angeles	Energy Audit	2001
City of West Covina	Los Angeles	Energy Audit	2000
Community Hospital Of Long Beach	Los Angeles	Energy Audit	2001
County Of LA, Office of Education	Los Angeles	Energy Audit	2001
Covina Valley USD	Los Angeles	Energy Audit	2000
Hughes- Elizabeth Lakes Union	Los Angeles	Energy Audit	2001
LA Unified	Los Angeles	New Construction	2001
Pomona USD	Los Angeles	Energy Audit	2002
Whittier City SD (14, DO, Maint. Yard)	Los Angeles	Energy Audit	1998
Bass Lake Jt. Union ESD (2)	Madera	Energy Audit	1998
Tamalpais Union HSD	Marin	Energy Audit	2001
Arena Union ESD (1)	Mendocino	Energy Audit	1998
Leggett Valley USD	Mendocino	Energy Audit	2000
Mendocino Coast Park Dist	Mendocino	New Construction Review	2002
Round Valley USD	Mendocino	Energy Audit	2000
Willits USD	Mendocino	Energy Audit	2001
Greenfield Union SD (4 + Dist. Ofc)	Monterey	Energy Audit	1998
Pacific Grove Unified	Monterey	Energy Audit	2002
Pacific Grove Unified	Monterey	Energy Audit	2002
Pleasant Valley ESD (2)	Nevada	Energy Audit	1997
City of Fountain Valley	Orange	Energy Audit	1999
Santa Ana USD	Orange	New Construction	2001
Savanna Elementary SD	Orange	Energy Audit	2002
Eureka Union Elementary SD	Placer	Energy Audit	2001
Foresthill Union	Placer	Energy Audit	2002
Foresthill Union	Placer	Energy Audit	2002
Loomis Union	Placer	Energy Audit	2002
Placer Union USD	Placer	Energy Audit	2000
Tahoe- Truckee Unified	Placer	New Construction	2001
City Of Indio	Riverside	Energy Audit	2001
Murrieta Valley USD	Riverside	Energy Audit	2001
City of Sacramento	Sacramento	Energy Audit	1998
City of Sacramento	Sacramento	New Construction Review	2003
Sacramento City USD	Sacramento	Energy Audit	1999
San Juan USD	Sacramento	Energy Audit	2002
Bear Valley USD	San Bernardino	Energy Audit	2002
Claremont University	San Bernardino	Energy Audit	2003

Attachment A
Five Year Listing of Projects

ORGANIZATION	COUNTY	TYPE OF ASSISTANCE	DATE
County of San Bernardino	San Bernardino	New Construction Review	2001
Snowline Joint USD	San Bernardino	Energy Audit	2001
St.Leander School	San Bernardino	Energy Audit	2002
City of El Cajon	San Diego	Energy Audit	1999
City of Escondido	San Diego	Energy Audit	1999
City of National City	San Diego	Energy Audit	2000
Escondido Union SD (1)	San Diego	Energy Audit	1998
San Ysidro USD	San Diego	Energy Audit	2002
Santee Elementary	San Diego	Energy Audit	2002
Sweetwater Union HSD (9)	San Diego	Energy Audit	2000
City of Manteca	San Joaquin	Energy Audit	1998
City of Stockton	San Joaquin	Energy Audit	2001
City of Burlingame	San Mateo	Energy Audit	2001
La Honda- Pescadero Unified	San Mateo	Energy Audit	2002
La Honda- Pescadero Unified	San Mateo	Energy Audit	2002
Mills Peninsula Health SVS	San Mateo	Energy Audit	2001
Portola Valley Elementary	San Mateo	Energy Audit	2001
Ravenswood City SD	San Mateo	Energy Audit	2000
San Mateo County Office Of Education	San Mateo	Energy Audit	2000
County of Santa Barbara	Santa Barbara	Design Assistance	2000
East Side Union High	Santa Clara	Energy Audit	2001
East Side Union High	Santa Clara	Energy Audit	2001
Mid Peninsula Health Open Space Dist	Santa Clara	Energy Audit	2001
Morgan Hill USD (Focused)	Santa Clara	Energy Audit	1998
City of Anderson	Shasta	Energy Audit	1998
City of Redding	Shasta	Energy Audit	1998
Shasta Union HSD (2 pools)	Shasta	Energy Audit	1999
Dixon USD (6 + Dist. Ofc)	Solano	Energy Audit	1997
Fairfield Suisun Sewer District	Solano	Water/Waste Water Audit	2001
City of Santa Rosa	Sonoma	Water/Waste Water Audit	2002
City of Santa Rosa School District	Sonoma	New Construction	2002
Forestville Union ESD (1)	Sonoma	Energy Audit	1999
City of Modesto	Stanislaus	Energy Audit	1999
Denair Unified	Stanislaus	Energy Audit	2002
Denair Unified	Stanislaus	Energy Audit	2002
Denair Unified	Stanislaus	Energy Audit	2002
Hickman SD (1 + Charter)	Stanislaus	Energy Audit	1999
Yuba City USD	Sutter	Energy Audit	2001
Lewiston ESD (1)	Trinity	Energy Audit	1997
Weaverville ESD (1)	Trinity	Energy Audit	1999
City of Tulare	Tulare	Review Energy Audit	1999
City of Ojai	Ventura	Energy Audit	2000
County of Ventura	Ventura	New Construction Review	1999
Pleasant Valley	Ventura	Energy Audit	2001
Pleasant Valley	Ventura	Energy Audit	2001

Attachment B
Current Contract Expenditures (2)

Task Areas	7/2001-12/2001	1/2002 - 12/2002	1/2003-10/2003	Estimated Total Expenditures
Evaluate Energy Efficiency Opportunities in Existing buildings	$152,952	$324,318	$60,695	**$537,965**
Support of New Construction Projects	$85,970	$44,078	$54,407	**$184,455**
Cogeneration, Distributed Generation, Renewable Energy Systems and Thermal Energy Storage	$7,000	$17,000	$0	**$24,000**
Water and Wastewater	$9,800	$28,580	$0	**$38,380**
Engineering Support	$0	$7,100	$0	**$7,100**
Marketing	$7,250	$0	$0	**$7,250**
Administrative Support *	$112,500	$0	$0	**$112,500**
Subtotals	**$375,472**	**$421,076**	**$115,102**	**$911,650**

Note: * 1) Support for three year contract term

2) Dollar Amounts represent the amount of Work Authorizations Issued, not necessarily spent.

Attachment C

Current Technical Assistance Contractors
Prime and Subcontractors

1) **ELEY ASSOCIATES** ***(Prime Contractor)***
142 MINNA STREET
SAN FRANCISCO, CA 94105
Contact: Erik Kolderup ***(Contract Manager)***
Tel # (415) 957-1977 x116
Fax # (415) 957-1381
Kolderup@eley.com
(New Construction Design Review, T-24, solar)

SIMON & ASSOCIATES
65 McCOPPIN STREET
SAN FRANCISCO, CA 94103
Contact: Lynn Simons
Tel # (415) 437-1425
Fax #(415) 437-1428
Lynn@greenbuild.com
(Sustainable Building Design)

TAYLOR ENGINEERING
1305 MARINA VILLAGE PARKWAY, SUITE 101
ALAMEDA, CA 94501
Contact: Mark Hydeman
Tel # (510) 749-9135
Fax # (510) 749-9136
Mhydeman@taylor-engineering.com
(Heating, ventilating and air conditioning)

BENYA LIGHTING DESIGN
1880 WILLAMETTE FALLS DRIVE, SUITE 220
WEST LINN, OR 97068
Contact: Jim Benya
Tel # (503) 657-9157
Fax #(503) 657-9153
jbenya@benyalighting.com
(Lighting design)

SIEGEL AND STRAIN ARCHITECT
1295 59TH STREET
EMERYVILLE, CA 94608
Contact: Larry Strain
Tel # (510) 547-8092
Lstrain@siegelstrain.com
(Sustainable buildings – new construction)

HESCHONG MAHONE GROUP
11626 FAIR OAKS BLVD. #302
FAIR OAKS, CA 92628
Contact: Lisa Heschong
Tel # (916) 962-7001
Fax #( )
Lheschong@h-m-g.com
(New construction-schools)

PARSONS
2101 WEBSTER STREET, SUITE 700
OAKLAND, CA 94612
Contact: Vinod Badani
Tel # (510) 273-3604
Fax# (510) 835-4335
Vinod.badani@parsons.com
(Water and Wastewater project assistance)

CLANTON & ASSOCIATES, INC.
4699 NAUTILUS CT. SO. #102
BOULDER, CO 80301
Contact: Nancy Clanton, Office Manager
Tel # (303) 530-7229
Fax # (303) 530-7227
nancy@clantonassociates.com
Kay@clantonassociates.com
(Lighting design)

Attachment C

Current Technical Assistance Contractors
Prime and Subcontractors

ELEY ASSOCIATES *(Prime Contractor)*
Continued

ALCORN & ASSOCIATES
1000 "Q" STREET, SUITE 120
SACRAMENTO, CA 95814
Contact: Mark Alcorn
Tel # (916) 444-5959
Fax# (916) 443-6719
Mark@alcornlaw.com
(Legal Services)

BERKELEY SOLAR GROUP
1327 Grand Avenue
Piedmont, CA 94610-1019
Contact: Bruce Wilcox
Tel # (510) 601-7475
Bwilcox@b-s-g.com
(Metering project assistance)

THOMAS HAVEY LLP
5000 EXECUTIVE PARKWAY, SUITE 400
SAN RAMON, CA 94583
Contact: Michael Quakenbush
Tel # (925) 277-9100
Fax# (925) 277-9552
Mquackenbush@havey.com
(Accounting Services)

Attachment C

Current Technical Assistance Contractors
Prime and Subcontractors

2) **DIGITAL ENERGY** ***(Prime Contractor)***
650 HAMPSHIRE ROAD, SUITE 204
WESTLAKE VILLAGE, CA 91361
Contact: Jai Agaram
Tel. # (805) 374-1777 or
(805) 497-3417 (hm)
Fax # (805) 374-1779
Jagaram@digitalenergy.com
Jagaram@aol.com (hm)

(Comprehensive energy audits)

BECHARD LONG AND ASSOCIATES, INC.
10670 TREENA STREET, SUITE 208
SAN DIEGO, CA 92131
Contact: Bruce Bechard
Tel # (858) 578-8861
Fax # (858) 578-8865
bbechard@bech.com
(Comprehensive energy audits)

SERVIDYNE SYSTEMS, LLC
1350 SPRING STREET, SUITE 200
ATLANTA, GA 30309
Contact: Barry Abramson
Tel # (800) 241-8996, 255
Fax # (404) 347-8637
Barry.abramson@servidyne.com
(Comprehensive energy audits)

BUILDING PERFORMANCE ENGINEERS, INC.
3588 HABERSHAM AT NORTHLAKE BLDG. "O"
TUCKER, GA 30084
Contact: Jim Poulos
Tel # (770) 270-0100
Fax #(770) 270-0300
Jimpoulos@bpe-inc.com
(Comprehensive energy audits)

CTG ENERGETICS, INCORPORATED
16 TECHNOLOGY DRIVE, SUITE 109
IRVINE, CA 92618
Contact: Malcom Lewis
Tel # (949) 790-0010
Fax #(949) 790-0020
Ml@ctg-net.com
(New construction design assistance)

MATTHEW BRADY
11211 GOLD COUNTRY BLVD, SUITE 101
GOLD RIVER, CA 95670
Contact: Matthew Brady
Tel. # (916) 442-5600/635-6800
Fax # (916) 442-5718/635-6833
Bradylaw@pacbell.net

(Utility Regulatory Expert)

CONSERVATION TECHNOLOGY
1018 OXFORD AVENUE
MARINA DEL REY, CA 90292
Contract:Ying-Nien Yu, P.E.
Tel # (310) 578-1280
Fax# (310) 578-1211
(Project Metering Assistance)

Attachment C

Current Technical Assistance Contractors
Prime and Subcontractors

3) **BEVILACQUA-KNIGHT, INC. (BKI)** (Marketing, brochures, case studies, etc.)
3967 TRUST WAY
HAYWARD, CA 94545
Contact: Robert Knight
Tel. # (510) 444-8707, 223
Fax #
Rknight@bki.com

4) **HDR ENGINEERING INC** (Prime contractor) (Water and wastewater project assistance)
271 TURN PIKE DRIVE
FOLSOM, CA 95630
Contract Manager: Dave Reardon
Folsom Office Contact:
Dave Reardon
Tel # (916) 351-3820
Dreardon@hdrinc.com

POWER HYDRODYNAMICS (Pump testing assistance)
6301 BEARDEN LANE
MODESTO, CA 95357
Contact: Bill Power
Tel # (209) 527-2908
bill@powerhydrodynamics.com

5) **BROWN, VENCE AND ASSOCIATES** (Prime Contractor) (Comprehensive energy audits)
65 BATTERY STREET, SUITE 200
SAN FRANCISCO, CA 94111
Contact: Leslie Kramer
Tel # (415) 434-0900 x146
Fax # (415) 956-6220
Lkramer@brownvence.com

SOUTHERN EXPOSURE ENGINEERING INC. (Subcontractor to BVA)
1816 HOLMES STREET
LIVERMORE, CA 94550
Tel # (925) 371-8001
Fax #(925)
Need e-mail address

ENERGY SOLUTIONS (Marketing, brochures, case studies, etc.)
1738 EXCELSIOR AVE
OAKLAND CA 94602
Tel #: (510) 482-8386
Fax #: (510) 482-4421
sam@energy-solution.com

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Current Technical Assistance Contractors
Prime and Subcontractors

6) WATER AND ENERGY MANAGEMENT CO., INC. (Prime Contractor) (Cogeneration)
79 HILLMONT PLACE
DANVILLE, CA 94526
Contact: Bob Spitzka
Tel # (925) 820-6603
Fax #(925) 743-3888
Spitzka@earthlink.net

DIETRICH ENGINEERING (Subcontractor to Water and Energy Management)
P.O. BOX 7
COOL, CA 95614
Contact: Dave Dietrich
Tel # (530) 887-0100
Dxdl@earthlink.net

LAFAYETTE ENGINEERS, INC. (Subcontractor to Water and Energy Management)
P.O.BOX 1057
LAFAYETTE, CA 94549
Contact: Don Anderson
Tel # (925) 376-5026
No e-mail address

Attachment C

Current Technical Assistance Contractors
Prime and Subcontractors